

**2002-04 OPERATING & CAPITAL BUDGET
RECOMMENDATIONS: PRELIMINARY TIMELINE**

**Agenda Item I-3
March 19, 2001**

The Council on Postsecondary Education is required to submit the 2002-04 operating and capital budget recommendations for the public institutions and the council to the Governor's Office for Policy and Management and the Legislative Research Commission by November 15, 2001. The preliminary timeline for developing these recommendations is attached. In addition to the activities listed on the timeline, the presidents and the chief budget officers will continue to meet regularly with the council staff to discuss the development of the recommendations.

Staff Preparation by Angela S. Martin

Council on Postsecondary Education
2002-04 Operating Capital Recommendations
Work Schedule

Date	Category	Participants	Activity
January 16, 2001	Points of Consensus	SCOPE Operating Budget Review Subcommittee Meeting	Discussion
January 16, 2001	Points of Consensus	Finance Committee	Discussion
February 5, 2001	Points of Consensus	Council Meeting	Action: Endorse
February 7, 2001	Points of Consensus	SCOPE Meeting	Action: Present
January 31, 2001	Mandated Programs / Debt Service Meeting	Work Group Meets	Commence Work
February 19, 2001	Mandated Programs / Debt Service	Institutional Reps	Institutions to provide response on mandated programs / debt service issues.
March 1, 2001	Mandated Programs / Debt Service	CBO Meeting	Update of Work Group
March 5, 2001	Mandated Programs / Debt Service	Council Staff	Begin work to have a consultant design survey
April 26, 2001	Mandated Programs / Debt Service	CBO Meeting	Update of Work Group
May 1, 2001	Mandated Programs / Debt Service	Council Staff / Consultant	Completes survey
May 31, 2001	Mandated Programs / Debt Service	Work Group	Work Group finishes
June 6, 2001	Mandated Programs / Debt Service	Presidents Meeting	Update: Work Group
January 31, 2001	Space Planning Issues	Work Group Meets	Commence Work
February 27, 2001	Space Planning Issues	Council staff e-mails update to Work Group	Staff issue revise paper on space planning
March 1, 2001	Space Planning Issues	CBO Meeting	Update of Work Group
March 7, 2001	Space Planning Issues	Work Group Response Due	Work Group response due
March 5, 2001	Space Planning Issues	Council Staff	Begin work with Paulien & Associates to review space model
March 5, 2001	Space Planning Issues	Council Staff	Begin work to have a professional ready to review capital projects
April 26, 2001	Space Planning Issues	CBO Meeting	Update of Work Group
May 21, 2001	Space Planning Issues	Council Meeting	Discussion: Space planning guidelines revisions
May 15, 2001	Space Planning Issues	Professional	Professional completes review of capital projects for quality and fitness of space
May 31, 2001	Space Planning Issues	Work Group	Work Group finishes
June 6, 2001	Space Planning Issues	Presidents Meeting	Update: Work Group
July 30, 2001	Space Planning Issues	Council Meeting	Action: Space planning guidelines revisions
February 5, 2001	Operating Budget	Council Meeting	Action: Direct staff to develop detail funding guidelines
March 1, 2001	Operating Budget	CBO Meeting	Discussion: Work Schedule
March 1, 2001	Operating Budget	Council Staff , GOPM	Staff discuss draft 2002-04 executive budget guidelines
March 7, 2001	Operating Budget	Presidents Meeting	Discussion: Work Schedule
March 19, 2001	Operating Budget	Council Meeting	Discussion: Work Schedule
March 19, 2001	Operating Budget	Council Meeting	Discussion: Tuition-Setting Guidelines
April 1, 2001	Operating Budget	GOPM	GOPM provides draft 2002-04 budget guidelines
April 26, 2001	Operating Budget	CBO Meeting	Discussion: Tuition-Setting Guidelines
May 2, 2001	Operating Budget	Presidents Meeting	Discussion: Tuition-Setting Guidelines
May 21, 2001	Operating Budget	Council Meeting	Action: Tuition-Setting Guidelines
June 8, 2001	Operating Budget	SCOPE Meeting	Development of 2002-04 operating and capital budget recommendations
July 15, 2001	Operating Budget	LRC	Legislative Branch promulgates 2002-04 budget guidelines
August 1, 2001	Operating Budget	Council Staff	Staff develop draft branch budget request understanding

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Date	Category	Participants	Activity
August 15, 2001	Operating Budget	Council Staff, LRC, GOPM	Staff transmits draft branch budget request understanding memorandum
August 25, 2001	Operating Budget	LRC, GOPM	LRC and GOPM respond to draft branch budget request understanding memorandum
August 30, 2001	Operating Budget	Council Staff	Transmit branch budget request understanding memorandum to institutions
September 1, 2001	Operating Budget	GOPM	Issues Revenue Report
September 6, 2001	Operating Budget	CBO Meeting	Discussion: Operating budget request
September 12, 2001	Operating Budget	Presidents Meeting	Discussion: Operating budget request
September 24, 2001	Operating Budget	Council Meeting	Discussion: Operating budget request
September 26, 2001	Operating Budget	SCOPE Meeting	Development of 2002-04 operating and capital budget recommendations
October 4, 2001	Operating Budget	CBO Meeting	Discussion: Operating budget request
October 10, 2001	Operating Budget	Presidents Meeting	Discussion: Operating budget request
October 15, 2001	Operating Budget	??	Revenue Forecast
November 5, 2001	Operating Budget	Council Meeting	Action: Approve 2002-04 operating budget recommendation
November 15, 2001	Operating Budget	SCOPE Meeting	Information: 2002-04 operating and capital budget recommendation
February 5, 2001	Capital Budget	Council Meeting	Action: Direct staff to develop detail funding guidelines
March 1, 2001	Capital Budget	CBO Meeting	Discussion: Work Schedule
March 15, 2001	Capital Budget	Council Staff	Staff e-mail capital priorities to CBOs
April 4, 2001	Capital Budget	Presidents Meeting	Capital budget priorities
April 16, 2001	Capital Budget	Capital Planning Advisory Board	Institutions submit 2002-08 Six-Year Capital Plans
April 26, 2001	Capital Budget	CBO Meeting	Discussion: Capital priorities
May 2, 2001	Capital Budget	Presidents Meeting	Capital budget priorities
May 21, 2001	Capital Budget	Council Meeting	Discussion: Capital budget framework and priorities
June 8, 2001	Capital Budget	SCOPE Meeting	Development of 2002-04 operating and capital budget recommendations
July 1, 2001	Capital Budget	Capital Planning Advisory Board Meeting	Presidents present institutional priorities (2002-08)
July 1, 2001	Capital Budget	Capital Planning Advisory Board Meeting	Council Chair presents draft capital priorities (2002-08)
July 1, 2001	Capital Budget	CBO Meeting	Capital budget priorities
July 2, 2001	Capital Budget	Institutions	Submit 2002-04 capital budget request
July 30, 2001	Capital Budget	Council Meeting	Action: Approve capital budget priorities
September 1, 2001	Capital Budget	Capital Planning Advisory Board	Establishes statewide capital priorities
September 6, 2001	Capital Budget	CBO Meeting	Discussion: Capital budget request
September 12, 2001	Capital Budget	Presidents Meeting	Discussion: Capital budget request
September 24, 2001	Capital Budget	Council Meeting	Discussion: Capital budget request
September 26, 2001	Capital Budget	SCOPE Meeting	Development of 2002-04 operating and capital budget recommendations
October 1, 2001	Capital Budget	Capital Planning Advisory Board	Action: Adopt statewide capital plan
October 4, 2001	Capital Budget	CBO Meeting	Discussion: Capital budget request
October 10, 2001	Capital Budget	Presidents Meeting	Discussion: Capital budget request
November 1, 2001	Capital Budget	Capital Planning Advisory Board	Issues Plan
November 5, 2001	Capital Budget	Council Meeting	Action: Approve 2002-04 capital budget recommendation
November 15, 2001	Capital Budget	SCOPE Meeting	Development of 2002-04 operating and capital budget recommendation
March 1, 2001	Tuition-Setting Guidelines	CBO Meeting	Discussion: Tuition-Setting Guidelines
March 7, 2001	Tuition-Setting Guidelines	Presidents Meeting	Discussion: Tuition-Setting Guidelines
March 19, 2001	Tuition-Setting Guidelines	Council Meeting	Discussion: Tuition-Setting Guidelines
April 26, 2001	Tuition-Setting Guidelines	CBO Meeting	Discussion: Tuition-Setting Guidelines
May 2, 2001	Tuition-Setting Guidelines	Presidents Meeting	Discussion: Tuition-Setting Guidelines
May 21, 2001	Tuition-Setting Guidelines	Council Meeting	Action: Tuition-Setting Guidelines
May 21, 2001	Tuition-Setting Guidelines	Council Meeting	Action: Request institutions to report planned tuition rates and revenues for 2002-04

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Date	Category	Participants	Activity
September 1, 2001	Tuition-Setting Guidelines	Institutions	Institutions report planned tuition rates and revenues for 2002-04 to council
September 24, 2001	Tuition-Setting Guidelines	Council Meeting	Information: Reported tuition rates and revenues for 2002-04
September 26, 2001	Tuition-Setting Guidelines	SCOPE	Information: Reported tuition rates for 2002-04
February 5, 2001	Benchmark Funding Model	Council Meeting	Discussion: Key Indicators
March 1, 2001	Benchmark Funding Model	CBO Meeting	Tuition percentages deduction
March 19, 2001	Benchmark Funding Model	Council Meeting	Discussion: Tuition percentages deduction
April 26, 2001	Benchmark Funding Model	CBO Meeting	Discussion: Benchmark revisions / tuition percentages deduction / central tendency
May 2, 2001	Benchmark Funding Model	Presidents Meeting	Discussion: Benchmark revisions / tuition percentages deduction / central tendency
May 21, 2001	Benchmark Funding Model	Council Meeting	Discussion: Benchmark revisions / tuition percentages deduction / central tendency
September 6, 2001	Benchmark Funding Model	CBO Meeting	Discussion: Benchmark funding model results
September 12, 2001	Benchmark Funding Model	Presidents Meeting	Discussion: Benchmark funding model results
September 24, 2001	Benchmark Funding Model	Council Meeting	Action: Tuition percentages deduction / central tendency
November 5, 2001	Benchmark Funding Model	Council Meeting	Action: Approve 2002-04 operating budget recommendation
April 26, 2001	Operating Base Adjustments	CBO Meeting	M&O / Debt service
April 2, 2001	Incentive Trust Funds	Council Staff / KHEAA	Begin discussions on KEES program
April 26, 2001	Incentive Trust Funds	CBO Meeting	Trust funds, amounts, and distribution guidelines
May 2, 2001	Incentive Trust Funds	Presidents Meeting	Trust funds, amounts, and distribution guidelines
May 21, 2001	Incentive Trust Funds	Council Meeting	Discussion: Trust funds, amounts, and distribution guidelines
September 6, 2001	Incentive Trust Funds	CBO Meeting	Trust funds, amounts, and distribution guidelines
September 12, 2001	Incentive Trust Funds	Presidents Meeting	Trust funds, amounts, and distribution guidelines
September 24, 2001	Incentive Trust Funds	Council Meeting	Discussion: Trust funds, amounts, and distribution guidelines
October 4, 2001	Incentive Trust Funds	CBO Meeting	Discussion: Trust funds, amounts, and distribution guidelines
October 10, 2001	Incentive Trust Funds	Presidents Meeting	Discussion: Trust funds, amounts, and distribution guidelines
November 5, 2001	Incentive Trust Funds	Council Meeting	Action: Trust funds, amounts and distribution guidelines
April 26, 2001	Special Funds	CBO Meeting	Institutional requests; submission guidelines and evaluation criteria
May 2, 2001	Special Funds	Presidents Meeting	Institutional requests; submission guidelines and evaluation criteria
May 21, 2001	Special Funds	Council Meeting	Discussion: Special funds request guidelines and evaluation criteria
July 1, 2001	Special Funds	CBO Meeting	Institutional requests; submission guidelines and evaluation criteria
July 30, 2001	Special Funds	Council Meeting	Action: Approve special funds request guidelines and evaluation criteria
September 1, 2001	Special Funds	Institutions	Institutions submit special funds requests to council
September 12, 2001	Incentive Trust Funds	Presidents Meeting	Discussion: Submitted special requests
September 24, 2001	Special Funds	Council Meeting	Discussion: Submitted special requests
November 5, 2001	Special Funds	Council Meeting	Action: Approve special funds recommendations
April 26, 2001	Funding Distribution Policy	CBO Meeting	Discussion: Funding distribution policy
May 2, 2001	Funding Distribution Policy	Presidents Meeting	Discussion: Funding distribution policy
July 30, 2001	Funding Distribution Policy	Council Meeting	Discussion: Funding distribution policy
September 6, 2001	Funding Distribution Policy	CBO Meeting	Discussion: Funding distribution policy
September 12, 2001	Funding Distribution Policy	Presidents Meeting	Discussion: Funding distribution policy
September 24, 2001	Funding Distribution Policy	Council Meeting	Action: Funding distribution policy

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Date	Category	Participants	Activity
September 24, 2001	Council Agency Operating Budget	Council Meeting	Discussion: Agency operating and capital budget request
November 5, 2001	Council Agency Operating Budget	Council Meeting	Action: Approve Agency budget and capital request
April 16, 2001	Council Agency Capital Budget	Capital Planning Advisory Board	Council submits 2002-08 Six-Year Capital Plan for agency
November 5, 2001	Council Agency Capital Budget	Council Meeting	Action: Approve 2002-04 Agency budget and capital request